

Current Training Offerings – Office of Finance
Updated 6/5/2024

Name of Training	Type	Description	Materials/Method of Delivery	When/How Frequently	Audience
FORMAL TRAININGS/RESOURCES					
Certificate in University Financial Management (CUFM) Program https://odu.edu/facultystaff/training-development/university-financial-management	Optional Certificate Program – recognized by HR FORMAL IN-PERSON TRAINING	<p>The Office of Finance has designed a <i>multi-section training program</i> that focuses on the business practices needed by budget units. It is a series of classes designed to familiarize the campus community with the different aspects of the Office of Finance. Participants who complete all required courses and pass the exam are awarded a Certificate in University Financial Management (CUFM).</p> <p>The intent of these classes is to ensure that employees have as much understanding of our complex system as possible, and employees may begin participating in the program any time during the year</p> <p>Courses include overviews of each of the following areas/topics:</p> <ul style="list-style-type: none"> • Budget Process & Management • Cashiering • Procurement Process Overview and Payment Process • AP: Travel • Employing Students • Payroll 	Online Course Handouts (slides – concise versions of the info/main points) available at all times and updated as policies change; Online Resource Textbooks per topic as reference available at all times and updated as policies change; Formal twice-annual live Zoom course offering each semester	<p>Offered twice annually (once a semester) Fall and Spring via Zoom</p> <p>4 courses per semester with a Capstone Review and Exam offered as well.</p> <p>As long as attendees take all 4 courses within a 2-year period they are eligible to attend the review and sit for the exam. Classes may be taken in any order.</p> <p><i>(NOTE: APD also offers one-on-one or targeted</i></p>	All Faculty/Staff– Most applicable and most frequent attendees include Office Managers/Admin Assistants who order, complete travel reimbursement requests, etc.; Fiscal Techs; often BUDs/BUD Delegates attend; sometimes VPs/Deans attend; those that hire students also attend those particular sessions. However, open up to any employee type (classified, wage, and/or student employees with supervisory approval).

				sessions, especially for Travel)	
ONLINE TUTORIAL VIDEOS					
<p>NEW! BUD Crash Course Video Training Series</p> <p><u>Budget Unit Director (BUD) - Old Dominion University (odu.edu)</u></p> <p><u>https://www.odu.edu/finance/data-control/budget-unit-director-bud</u></p>	<p>Optional Training – available as reference for anyone with BUD/BUD Delegate classification/Responsibilities</p> <p>ONLINE TRAINING VIDEOS & RESOURCES</p>	<p>The BUD Crash Course series was created to help new Budget Unit Directors (BUDS) across campus better understand what is required of this role. The series is broken down into 4 videos and covers: <u>What a BUD is</u>; <u>Budget Process Overview</u>; <u>Budget Utilization, Management, & Basics</u>; & a <u>Final Wrap Up and Resource Guide</u>*.</p> <p><i>*NOTE – each of the above underlined bits are clickable links leading directly to the respective training video.</i></p>	<p>Online Resource – always available</p> <p>NO official in-person offerings.</p>	<p>NA – always available online.</p> <p>Not required.</p>	<p>External – All employees with budget oversight/responsibility. Those with BUD or BUD Delegate designation strongly encouraged to review in depth. Those higher in the org chart also encouraged to attend.</p>
<p>Monthly Cashiering Training Video</p> <p><u>https://odu.edu/facultystaff/training-development/university-financial-management/schedules.html.html</u></p>	<p>Required Training – concurrent with the Cashiering piece of the CUFM Program</p> <p>ONLINE TRAINING - Mandatory</p>	<p>To better serve the University Community, the Office of Finance Training Department now provides Cashiering Training catered to new and existing employees who work with and handle money on behalf of ODU via real-time accessible online video and handouts. <i>This training is required every 2 years; it is also required immediately if your job requirements have changed and you now accept funds or were recently hired by the University and will begin accepting funds.</i></p>	<p>Online Course Handouts (slides – concise versions of the info/main points) available at all times and updated as policies change; Online Resource Textbooks per topic as reference available at all times and updated as policies change; Formal monthly in-person course offering each semester as part of CUFM series</p>	<p>Available anytime online in video format</p> <p><i>(NOTE: APD can also offer targeted sessions for entire departments, though this is requested less frequently these days since video was created in 2020)</i></p>	<p>All employees (no matter classification) across campus responsible for accepting funds on behalf of ODU. Is a Commonwealth requirement they review once every 2 years.</p>

<p>PCI Training Video</p> <p>Payment Card Processing Rules - Old Dominion University (odu.edu)</p>	<p>Required Training – for anyone on campus involved in any aspect of payment card processing, transmission, or storage.</p> <p>ONLINE TRAINING – Mandatory</p>	<p>Payment Card Industry Data Security Standards Training – reviews best practices and requirements set forth by major credit card companies in order to continue to accept CC payments across campus, whether via credit card machines in person or via TouchNet/uStore online.</p>	<p>Online video training accessed via CampusGuard website – always available and updated as policies change.</p> <p>NO in-person offerings available.</p>	<p>Required annually (must send forms/proof of completed training to PCI Specialist by Fall of each year)</p> <p>Also required by those whose job duties change, then annually thereafter.</p>	<p>Anyone on campus who accepts CC payments at any time throughout the year.</p>
<p>ePrint Training Video Series</p> <p>https://odu.edu/facultystaff/university-business/information-management/data-control/eprint</p>	<p>Required Training – available as reference for anyone on campus with Banner Finance Access to view monthly financial reports/Payroll reports (with permission)</p> <p>ONLINE TRAINING & RESOURCES</p>	<p>ePrint is the monthly software we use to disburse final, approved monthly budget (and Payroll, with permission/proper accesses upon request) reports to each department. Monthly budget report access is automatic for those who have access to Banner Finance and Budget (may only see details pertaining to their own budget code in the system).</p> <p>We used to offer monthly in-person trainings, but found it was not an efficient use of time. Created (with ITS) training videos for navigation/software use, have central training page on website dedicated to ePrint, and provide written manual with screenshots to attendees, which may also be found online.</p>	<p>Online Resource – always available</p> <p>NO official in-person offerings available, though one-on-one may be offered as needed, and as determined by the Data Control Team.</p> <p>NO in-person training offerings available.</p>	<p>NA – always available online.</p> <p>Required viewing, especially for those in need of access to ePrint Payroll Reports.</p>	<p>External – All employees with Banner Finance access who oversee any aspect of Budget (or Payroll) for their departments.</p>

<p>Banner Training Videos</p> <p><i>To include: Banner Finance & Budget, Banner General Student</i></p> <p>NOTE: Banner Basics is NO LONGER OFFERED AS A SEPARATE COURSE! We build navigation/basic Banner into each Banner Session offered monthly.</p> <p><u>Banner Training - Old Dominion University (odu.edu)</u></p> <p>Banner Basics & Navigation: <u>Banner Basics - Old Dominion University (odu.edu)</u> <u>https://www.odu.edu/finance/training/banner-training/basics</u></p> <p>Finance: <u>Banner Finance & Budget - Old Dominion University (odu.edu)</u> <u>https://www.odu.edu/finance/training/banner-training/finance-budget</u></p> <p>Student: <u>Banner General Student - Old Dominion University (odu.edu)</u> <u>https://www.odu.edu/finance/training/banner-training/general-student</u></p>	<p>Optional Suggested training for new hires/those working in Banner across campus. HR/Department Supervisors recommend attendees.</p> <p>ONLINE TRAINING & RESOURCES</p>	<p>The Banner Training program is provided for Banner users throughout the University community who need to learn the skills necessary to use the administrative computer system. Review Banner Navigation, most-frequently used Finance and/or General Student Forms available per access class, and how to interpret/understand the info displayed within the system.</p> <p>Attendance NOT required before Banner Access is granted, nor does it guarantee/grant access.</p> <p>NOTE – this is a general training. Specific forms/more in-depth training may be required, but is completed within each individual department depending on necessity, processes, etc.</p>	<p>Available anytime online in video format. Online Training Handouts also always available online and updated as needed – handout covering each form reviewed during every training.</p> <p>NO in-person offerings available.</p>	<p>NA – always available online.</p> <p>Not required.</p> <p><i>(NOTE: APD will also offer one-on-one or targeted sessions as time allows and if requested)</i></p>	<p>External –</p> <p>Banner Finance: Individuals responsible for monitoring departmental budgets.</p> <p>Banner General Student: Individuals responsible for accessing student records or those who input student information.</p>
<p>Freshman Orientation – Breakout Sessions “Paying for Tuition” Video</p> <p><u>Tuition Payments - Old Dominion University (odu.edu)</u></p>	<p>Optional Offered through Incoming Student Orientation Sessions</p> <p>ONLINE VIDEO TRAINING/ INFORMATION DISTRIBUTED TO STUDENTS</p>	<p>Learn how tuition charges are calculated and review financial policies. Deadlines, payment options, how financial aid is applied toward student account charges, and how refunds are issued will be discussed. Receive information about our electronic billing process including how to designate others to receive billing notifications.</p>	<p>Video provided to all who register for incoming orientations.</p> <p>Video presentation available on Preview Website to incoming students; brochure containing major topics provided to each attendant as</p>	<p>Offered as a suggested breakout session at each Preview leading up to each semester.</p> <p>Required for students.</p>	<p>Incoming Students/Parents (aka: the bill payers) – both first-time and transfer students</p>

			well. Video also posted on Student Accounts/Student facing pages on OoF website.		
<p>“Fiscal Year End Training Refresher” Video Recording</p> <p><u>FYE2023 Training & Refresher - Old Dominion University Monarch Mediaspace (kaltura.com)</u></p>	<p><i>Optional</i></p> <p>ONLINE TRAINING VIDEO RESOURCE – Recorded version of live training with Q&A</p>	<p>We offer this each year as a refresher to anyone interested, and review fiscal year end dates, where to find these dates, how to access these in Outlook (with reminders), accrual, samples, system updates, etc.</p> <p>Procurement Services also offers a version of this training multiple times via Zoom to review Procurement-specific details.</p>	<p>Video always accessible and available on Office of Finance website.</p>	<p>NA – always available online.</p> <p>Not required</p>	<p>External – Any employee with Banner Finance access who oversee any aspect of Budget for their departments (BUDs, Fiscal Techs, Office Managers/Admin Assts, etc.)</p>
<p>WTE Quick Reference Guides & Video Resources</p> <p><u>Documentation/Training - Old Dominion University (odu.edu)</u></p>	<p><i>Optional</i></p> <p>ONLINE TRAINING RESOURCES & VIDEO</p>	<p>Quick Reference Guides and accompanying video per employee type (whether approver or inputting time) – how to use, input time, approve, etc. in WTE system</p>	<p>Handout /Video always available on Office of Finance website - homepage</p>	<p>NA – always available online.</p> <p>Not required</p>	<p>External – ALL employee classifications and approvers/proxies</p>
<p>Resolving Budget Discrepancies – IDTs & ASRs</p> <p>Interdepartmental Transfers (IDTs) Training Video and Form</p> <p><u>https://www.odu.edu/finance/data-control/resolving-budget-discrepancies</u></p> <p>Accounting Service Requests (ASRs) Form</p> <p><u>https://www.odu.edu/finance/data-control/resolving-budget-discrepancies</u></p>	<p><i>Optional</i></p> <p>ONLINE TRAINING RESOURCE</p>	<p>Video on how to correctly complete and submit an IDT Request. Link includes IDT form.</p> <p>Interdepartmental Transfers (IDTs) mailbox: <u>IDTs@odu.edu</u></p> <p>Accounting Service Requests (ASRs) mailbox: <u>DataControlASR@odu.edu</u></p>	<p>Video always present on OoF website – sent out as needed</p>	<p>NA – always available online.</p> <p>Not required</p>	<p>External – BUDs, Fiscal techs, Office Managers/Admin Assistants and others responsible for budget management/oversight</p>
<p>Internal Control/Fraud Prevention Video</p> <p><u>ARMICS - Old Dominion University (odu.edu)</u></p>	<p><i>Optional</i></p> <p>ONLINE TRAINING VIDEO</p>	<p>Video created with ARMICS representative buy-in regarding fraud awareness/what to look out for.</p>	<p>Video always present on OoF website – sent out as needed</p>	<p>NA – always available online.</p> <p>Not required</p>	<p>External – BUDs, Fiscal techs, Office Managers/Admin Assistants and others</p>

					responsible for budget management/oversight
Red Flag Training Program Video	<i>Optional</i> ONLINE TRAINING VIDEO	Video accessed via CampusGuard and overseen by the PCI Compliance Department. Red Flags work in conjunction with the Fraud Prevention methods we use on campus. This training reviews how to identify these red flags and notify the proper authorities to get them resolved and prevent fraudulent activity.	Video always present on CampusGuard website and a link is referenced on OoF website – sent out as needed	NA – always available online. Not required	External – any employee participates in background checks, credit card payments, credit checks, etc.
ONLINE RESOURCE/USER GUIDES					
“Financial Management Guidelines” https://odu.edu/content/dam/odu/offices/finance-office/docs/financial-management-guidelines.pdf	<i>Optional</i> ONLINE TRAINING RESOURCE	Brief PowerPoint Overview regarding major topics/guidelines for Financial Management within user’s departments	Presentation/Slides available on Office of Finance website at all times	NA – always available online. Not required	External – Any employee with Banner Finance access who oversee any aspect of Budget for their departments (BUDs, Fiscal Techs, Office Managers/Admin Assts, etc.)
“Banner Reconciliation Reminders” https://odu.edu/content/dam/odu/offices/finance-office/docs/banner-access-training.pdf	<i>Optional</i> ONLINE TRAINING RESOURCE	Quick Reference Guide – general access requests/access classes needed; BDM overview, Reconciliation Tools that exist; exporting details into Excel – meant to assist new BUDS/Fiscal Techs with a QUICK overview of budget management tools within Banner (mention of Insight and Procurement resources too)	Handout always available on Office of Finance website - homepage	NA – always available online. Not required	External – Any employee with Banner Finance access who oversee any aspect of Budget for their departments (BUDs, Fiscal Techs, Office Managers/Admin Assts, etc.)
General Accounting – Changes to Equip Location & Ownership User Guide https://odu.edu/content/dam/odu/offices/finance-office/docs/fixed-asset-photo-viewing-guide.pdf	<i>Optional</i> INFORMAL GUIDE AVAILABLE ONLINE	Quick Reference Guide available (with screenshots) on BDM viewing instructions and how to photograph/attach capitalized assets to Banner Fixed Asset record – provides a visual representation of the equipment.	Handout always available on Office of Finance website - homepage	NA – always available online. Not required	External – likely for those who purchase/oversee departmental equipment/ETF funding

General Accounting – Viewing Fixed Asset Photos User Guide https://odu.edu/content/dam/odu/offices/finance-office/docs/fixed-asset-workflow-user-guide.pdf	Optional INFORMAL GUIDE AVAILABLE ONLINE	For Intra and Interdepartmental Changes to Equipment Location and Ownership. All tagged equipment is recorded in Banner with an assigned location and responsible budget code. The responsible budget code is the department in custody of the asset and the Budget Unit Director assumes responsibility for the asset. When equipment is moved or transferred, an electronic workflow process must be utilized. This workflow replaces the paper form to complete an Intradepartmental (location change only) and Interdepartmental (location and responsible budget unit change) transfer.	Handout always available on Office of Finance website - homepage	NA – always available online. Not required	External – likely for those who purchase/oversee departmental equipment/ETF funding
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WEBSITE RESOURCES

Hiring Student Employees Webpage: https://odu.edu/facultystaff/employee-services/compensation/payroll/hiring-student-workers	Optional Website Materials – always available	<i>Materials and policy review available for interested parties</i>			<i>Departments who hire any student employees, no matter the classification; HR</i>
Resolving Budget Discrepancies Webpage: https://odu.edu/facultystaff/university-business/information-management/data-control/accounting-service-request-process	Optional Website Materials – always available	<i>Materials and policy review available for interested parties</i>			External – BUDs, Fiscal techs, Office Managers/Admin Assistants and others responsible for budget management/oversight
Vendor Guide on Webpage: https://odu.edu/vendors	Optional Website Materials – always available	<i>Materials and policy review available for interested parties</i>			<i>Those who place orders for departments, or who work with vendors – also External for vendors themselves</i>

Payment Card Processing Webpage: Payment Card Processing Rules - Old Dominion University (odu.edu)	Optional Website Materials – always available	Materials and policy review available for interested parties			External – BUDs, Fiscal techs, Office Managers/Admin Assistants and others who accept credit card payments on behalf of ODU
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OTHER FINANCIAL SERVICES DIVISION RESOURCES

Chrome River Quick Reference Guide https://odu.edu/content/dam/odu/offices/finance-office/policies/travel/chrome-river-user-guide.pdf <i>*PowerPoint with screenshots exists too – though not posted anywhere official. Rather sent out by travel processors/CTC as requested. This may have changed in recent time, but need to check with AP Travel on this.</i>	Optional ONLINE TRAINING RESOURCE (sometimes sent upon email request)	Quick Reference Guide on utilizing/navigating through Chrome River Reimbursement Software NOTE: other step-by-step guides with screenshots also exist for submitting and/or approving timesheets, as well as adding delegates, etc. – found here: https://odu.edu/facultystaff/employee-services/compensation/payroll/web-time-entry/training	Handout always available on Office of Finance website - homepage	NA – always available online. Not required	External –any employee who travels on behalf of ODU or anyone completing a reimbursement request *COULD target non-University employees too! (guests, applicants, etc.)
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Additional Procurement Training available – please visit the Procurement training page: [Procurement Training - Old Dominion University \(odu.edu\)](#)

Budget Office offers one-on-one budget review training for individual budgets, one-on-one Insight system training, and can answer budget-specific questions. Please contact them at budget@odu.edu.

HELPFUL LINKS & RECONCILIATION TOOLS

Banner: [banner.odu.edu](https://www.odu.edu/banner)

- **Requesting Banner Access:** <https://www.odu.edu/information-technology-services/midas/account-request>
- Contact the **Banner Hotline** with any Banner-related questions at bannerhotline@odu.edu
- Identifying AR, Budget, General Accounting, & Payroll Transaction Codes [training resource](#)

Banner Pre-Production Systems: Used for testing in PPRD environments: leoonline.pprd.odu.edu/

Banner ePrint: Monthly electronic budget reports: <https://eprint.odu.edu/cgi-bin/eprint.cgi>

- Visit <https://www.odu.edu/facultystaff/university-business/information-management/data-control/eprint> for more information about ePrint and to access the training video and ePrint manual
- Contact the Office of Finance Data Control Department with questions at: 757.683.3257 or bannerhotline@odu.edu
- Payroll Reports are available monthly, but initial access must be requested via the *ePrint Payroll Report Request Form*: <https://www1.odu.edu/content/dam/odu/offices/finance-office/data/payroll-eprint-request.pdf>

Insight: Centralized reporting and analytics system: <https://www.odu.edu/facultystaff/university-business/banner/insight>

- Contact the University Budget Office with questions at: 757.683.3127 or budget@odu.edu

Authorized Signature List: Individuals must be on the Master Signature List in order to purchase against budget codes at University Service Areas. For more information or to be added, visit: <https://www.odu.edu/finance/data-control/authorized-signature-list> or email signlist@odu.edu.

Budget Unit Directors (BUDs): Individuals responsible for the fiscal integrity of a budget. To change or assign a BUD, please visit: <https://www.odu.edu/finance/data-control/budget-unit-director-bud> or email budrequest@odu.edu.

Procurement Services Tools and Software Portals: Procurement Services offers a number of training opportunities and may be contacted anytime with questions at 757.683.3105 or procurement@odu.edu.

- **Contracts List:** <https://www.odu.edu/facultystaff/university-business/purchasing/contracts>
 - Don't forget to check other State Contracts and VASCUPP Contracts ODU has available!
- **eVA:** <https://www.odu.edu/facultystaff/university-business/purchasing/eva>
- **PCard Details/BoA Login:** <https://www.odu.edu/facultystaff/university-business/purchasing/purchasing-card>